



UEBT
SOURCING[®]
WITH RESPECT

UEBT BIODIVERSITY BAROMETER
The Biodiversity Reckoning

2022





TABLE IRIS IRISAPHYLLA

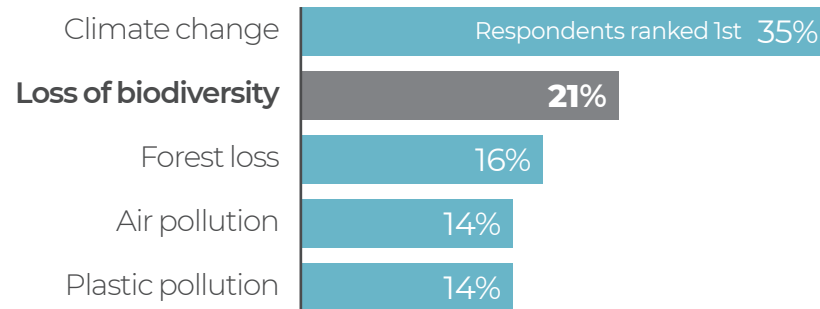
A BIODIVERSITY RECKONING FOR BRANDS

Since UEBT's launch in 2009, 13 years of quantitative research have highlighted the amazing growth of biodiversity awareness, with more companies and brands taking a stand in favour of sourcing with respect for people and biodiversity. This year, the organization has worked with Harris Interactive on a worldwide survey that takes a deep dive into consumers' biodiversity aspirations and expectations. More than 14 questions were asked, making this year's survey the most extensive research undertaken since UEBT's beginnings.

Over 80,000 people spanning 16 countries have been surveyed since 2009, and their responses have provided valuable insights to companies and governments working on biodiversity. In the interim years, consumers have become more demanding, asking for more information on natural ingredients and looking deeper for regenerative and fair sourcing practices.

For the 2022 UEBT Biodiversity Barometer, consumer research was conducted in Brazil, China, France, Germany, UK and USA. 6,000 people were surveyed, 1,000 per country. This report summarizes the results and presents the learnings from this decade-long research conducted by UEBT.

LOSS OF BIODIVERSITY IS THE SECOND MOST URGENT ENVIRONMENTAL CONCERN AFTER CLIMATE CHANGE



“ Over the years we have gone from rising awareness of what biodiversity is to today’s results: **the biodiversity crisis as an urgent issue of concern**

Rik Kutsch Lojenga, UEBT Executive Director

Across all countries, climate change is ranked as the 1st concern for 35% of respondents, while loss of biodiversity ranks 1st for 21%.

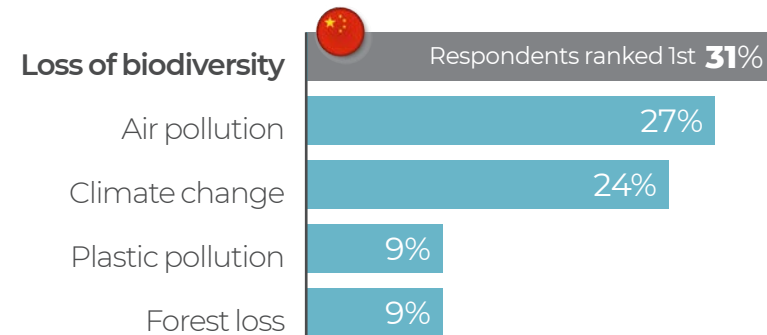
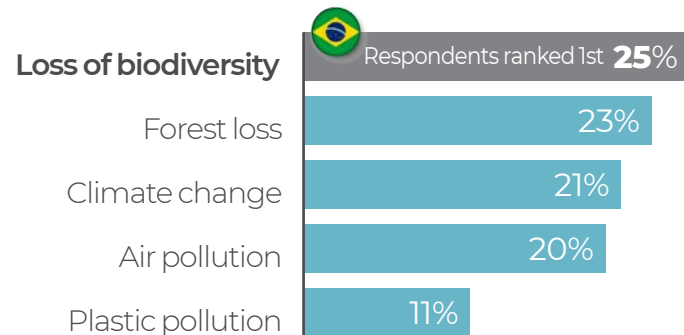
Loss of biodiversity reaches 63% when 1st, 2nd and 3rd rankings are taken cumulatively.



Q6. Here is a list of global environmental issues. Please rank them in the order of how personally important they are to you. Respondents had to rank the issues from 1st to 5th with 1st being the most personally important. Pre-given list in randomized order.

Basis – all sample – Brazil, China, France, Germany, UK, USA

BRAZIL AND CHINA LOSS OF BIODIVERSITY BECOMES THE HIGHEST GLOBAL ENVIRONMENTAL CONCERN



“ In **China 31%** of respondents ranked loss of biodiversity 1st, and in **Brazil 25%** of respondents ranked it 1st

Harris Interactive

In Brazil and China, two of the three countries where biodiversity awareness is highest, loss of biodiversity was ranked as the highest global environmental concern.

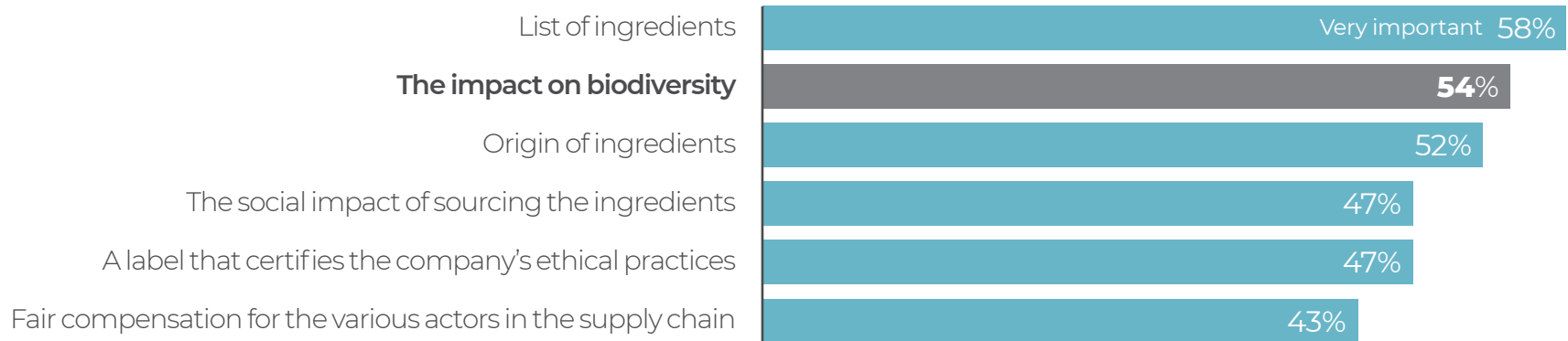
In China, loss of biodiversity was ranked 1st slightly more often than air pollution.

Q6. Here is a list of global environmental issues. Please rank them in the order of how personally important they are to you. Respondents had to rank the issues from 1st to 5th with 1st being the most personally important. Pre-given list in randomized order.

Basis – all sample – Brazil, China



CONSUMERS WANT INFORMATION ON A PRODUCT'S IMPACT ON BIODIVERSITY



Biodiversity is of significant interest to consumers. In fact, 54% of those surveyed said it was very important to them to have information on a product's impact on biodiversity listed on the product packaging or product web page, only slightly lower in importance than the list of ingredients.

Amongst those consumers who have the highest awareness of biodiversity, this figure goes up to 61%, also reaching 61% among consumers who buy natural beauty brands.

Respondents in Brazil appear to be particularly interested in these issues, scoring the highest for each item.

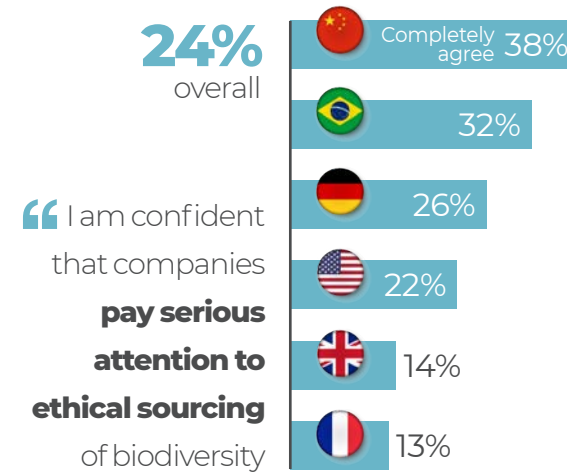
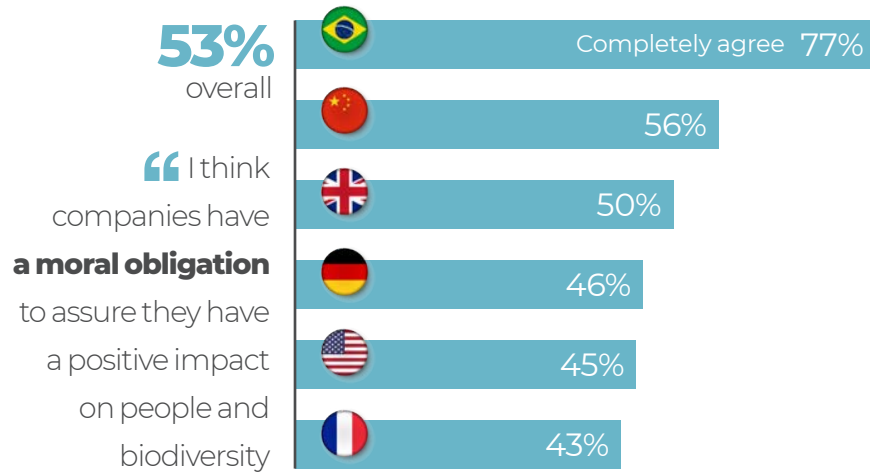
Responses show that importance is given to labels that validate a company's ethical sourcing practices, being very important in Brazil (76%), China (46%) and France (42%).



Q5. Companies communicate information on their product packaging or on product web pages. For each of the following elements, please tell us how important it is for you to get this information on the packaging or the product's web page. Answer choices were 'Very important,' 'Important,' 'Not so important,' 'Not at all important,' and 'I don't know'.

Basis – all sample – Brazil, China, France, Germany, UK, USA

BRAND INACTION ON PEOPLE AND BIODIVERSITY REMAINS A HURDLE



Consumers, however, are not convinced that companies do act positively on people and biodiversity – 24% of those surveyed say they are confident that companies pay serious attention to ethical sourcing of biodiversity.

Since 2020, the expectations of companies have increased - More than half of those surveyed ‘completely agree’ that it is a moral obligation for companies to assure they have a positive impact on people and biodiversity, with Brazil reaching 77% of those surveyed saying they ‘completely agree.’



Q4. Here are a number of statements about the involvement of companies in ethical sourcing of biodiversity. For each of them, could you please indicate whether you completely agree with it, rather agree, rather disagree or completely disagree?

Total of ‘Completely agree’ responses. Basis – all sample – Brazil, China, France, Germany, UK, USA

CHINA SHOWS HIGHEST CONFIDENCE IN COMPANY ACTION

“ I think companies have **a moral obligation** to assure they have a positive impact on people and biodiversity



“ I am confident that companies **pay serious attention to ethical sourcing** of biodiversity



In China ethical labelling rises in importance

A label that certifies companies' ethical practices:

46% 'How important it is for you to get this information on the packaging or the product's web page?'
Very Important

Q5. Companies communicate information on their product packaging or on product web pages. For each of the following elements, please tell us how important it is for you to get this information on the packaging or the product's web page. Answer choices were 'Very important,' 'Important,' 'Not so important,' 'Not at all important,' and 'I don't know'. Basis – China



Overall, Brazilian and Chinese consumers place a much higher responsibility on companies to make a positive impact.

While Chinese consumers seem to show the highest confidence in companies, **there is still a gap between their expectations of companies and their trust that a company is doing the right thing.**

Harris Interactive

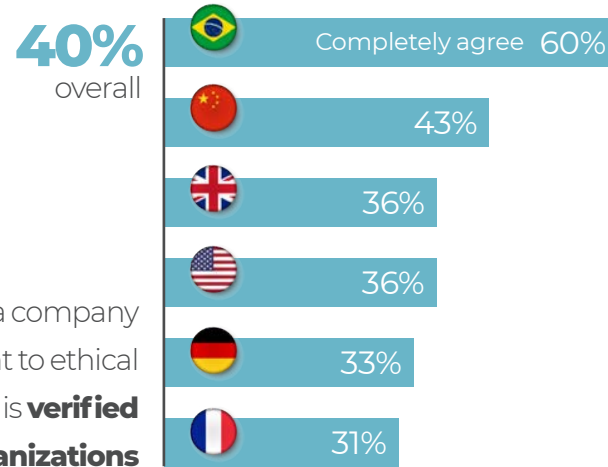
Q4. Here are a number of statements about the involvement of companies in ethical sourcing of biodiversity. For each of them, could you please indicate whether you completely agree with it, rather agree, rather disagree or completely disagree?

'Agree' = total of 'Completely agree' and 'Rather agree'. Basis – China



CN

CONSUMERS HAVE MORE FAITH WHEN COMPANY COMMITMENTS ARE INDEPENDENTLY CHECKED



“ I have more faith in a company whose commitment to ethical sourcing of biodiversity is **verified by independent organizations**

Many companies put in place responsible sourcing commitments and their own programmes or frameworks to bring these commitments to fruition.

These in-house actions are clearly seen by consumers as having more impartiality, transparency or rigour when they are independently checked, whether through formal verification or certification or through other types of partnerships with external organisations.

In the US, UK, France and Germany roughly one-third of consumers said they ‘completely agree’ these independent checks give them more faith in a company, and in Brazil this is as high as 60%.

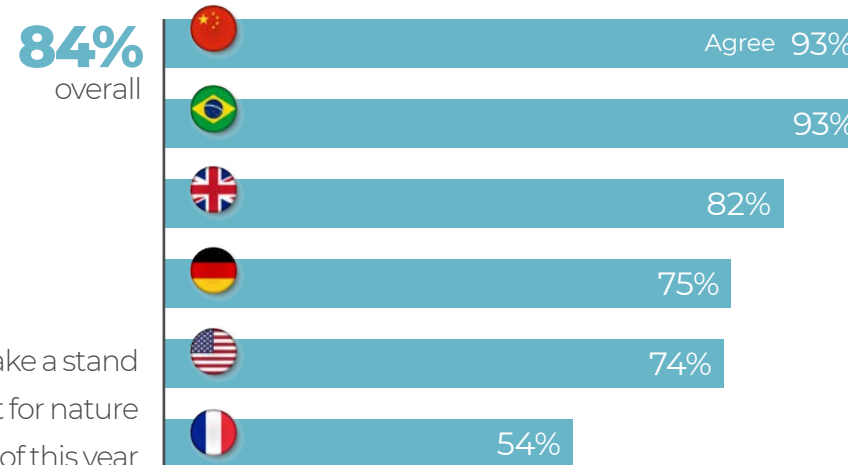
When taking into account the responses of ‘Completely agree’ combined with ‘Somewhat agree’ the percentage rises to 79% across all six countries, and to 91% of Chinese consumers.



Q4. Here are a number of statements about the involvement of companies in ethical sourcing of biodiversity. For each of them, could you please indicate whether you completely agree with it, rather agree, rather disagree or completely disagree?

Total of ‘Completely agree’ responses. Basis – all sample – Brazil, China, France, Germany, UK, USA

CONSUMERS WANT COMPANIES TO TAKE A STAND ON GLOBAL TARGETS



“ I would like companies to take a stand when the global agreement for nature is adopted at the end of this year

“ When consumers are informed about the coming post-2020 Global Biodiversity Framework, their **expectations are high when it comes to business**

David Ainsworth – Information Officer,
UNEP – Secretariat of the Convention on Biological Diversity



Often compared in importance to the 2015 Paris Agreement related to climate, the global agreement for nature will present an opportunity for business to contribute to its targets, signaling support for what may become the clear beacon for nature worldwide.

84% of consumers said they would like to see companies take a stand when the agreement is adopted.

Q4. Here is a number of statements about the involvement of companies in ethical sourcing of biodiversity. For each of them, could you please indicate whether you completely agree with it, rather agree, rather disagree or completely disagree?

'Agree' = total of 'Completely agree' and 'Rather agree'. Basis – all sample – Brazil, China, France, Germany, UK, USA

LIVING WAGE ON THE RISE TO IMPACT PURCHASING



“ This year we saw the product attribute of living wages rise higher than in previous surveys. This shows that **consumers are thinking about more than their own health when purchasing**. They also understand that how a product is produced can affect people’s livelihoods

Lara Koritzke, UEBT Communications and Marketing Director

Consumers place high importance on respect and biodiversity when choosing a product: chemical-free/toxic-free and paying a living wage to workers especially stand out as very important purchase drivers.

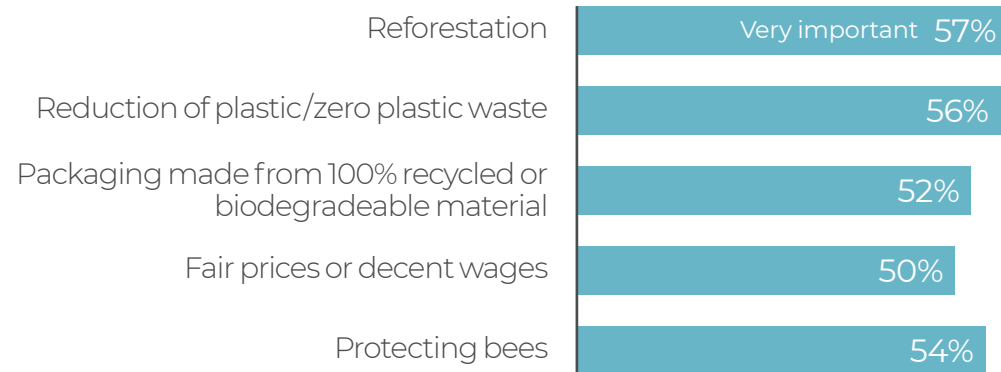
In the UK and US, the highest importance is placed on paying a fair wage to workers, while in EU countries chemical-free is the most important criterion. In Brazil and China, eco-responsible packaging is evaluated as most important.

Q7. We will now discuss your purchasing habits. Below is a list of criteria that can be attributed to products and the way they are produced. Please let us know to what extent each is important to you when choosing a product. Answer choices were 'Very important,' 'Important,' 'Not so important,' 'Not at all important,' and 'I don't know.' Pre-given list in randomized order.

All sample – Brazil, China, France, Germany, UK, USA



THE FIVE MOST IMPORTANT COMPANY ACTIONS TO ADDRESS: PEOPLE AND BIODIVERSITY



Ethical sourcing practices especially relating to biodiversity and protection of nature are expected from brands. Reforestation and reduction of plastic are rated as 'very important' actions.

In the top five, paying fair prices or decent wages and protecting bees are mentioned by half of the sample as 'very important' actions.

These results are even higher among women below 30 years old. 62% say it is 'very important' that companies address reforestation and 58% mention fair price.

Q8. Several actions have been taken by brands to address global issues affecting people and biodiversity. Below are a few examples. Please let us know how important each one is to you. Answer choices were 'Very important,' 'Important,' 'Not so important,' 'Not at all important,' and 'I don't know.' Pre-given list in randomized order.

Basis – all sample – Brazil, China, France, Germany, UK, USA



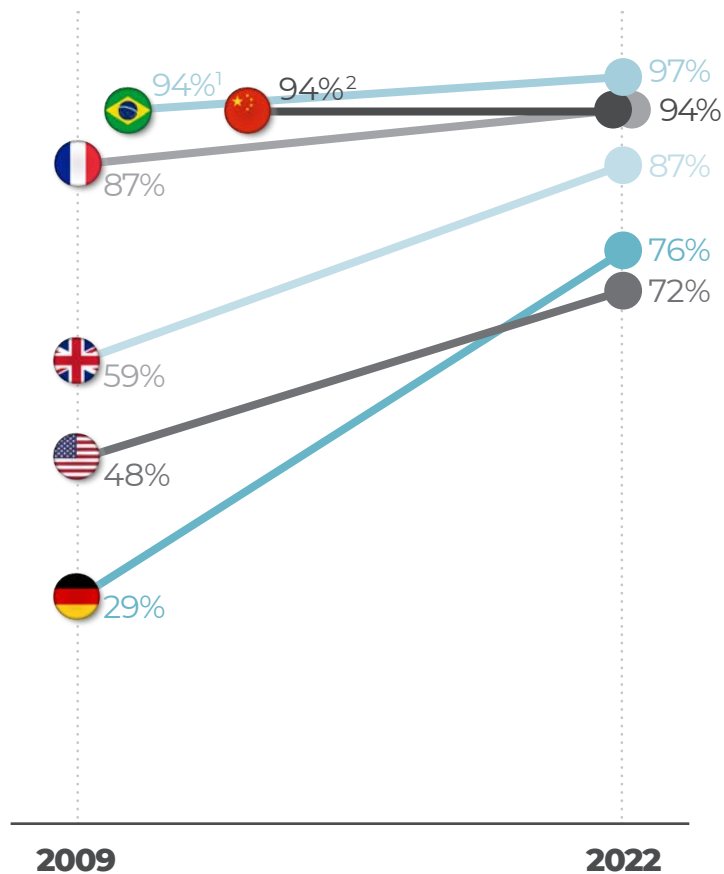
BIODIVERSITY AWARENESS IS THE NEW NORMAL



AWARENESS OF BIODIVERSITY AT RECORD HIGHS

THERE IS A GOOD UNDERSTANDING OF WHAT BIODIVERSITY IS

Awareness of 'Biodiversity'



Since 2009, more than 80,000 people have been surveyed, of which 6,000 were surveyed in 2022. Awareness and understanding of biodiversity have significantly grown over the last decade, a trend that is expected to continue.

“ **Biodiversity awareness** is now 72% or more in all the countries we sampled, compared to only 29% or more across the countries sampled in 2009

Harris Interactive

87% of consumers surveyed had heard of the term 'biodiversity' and 82% could select the correct definition of biodiversity: 'the diversity of plants and animals'. Scores are particularly high for Brazil and China.

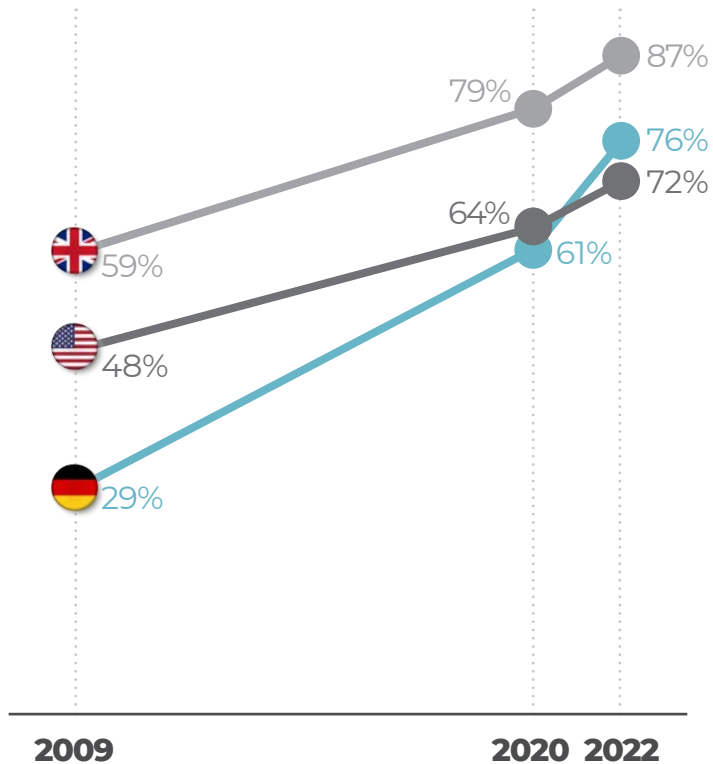
Q1. Personally, have you ever heard of 'biodiversity'? Score on total 'I have heard of it'

Basis – all sample. Initial sampling – 2009 France, Germany, UK, USA; ¹2010 Brazil; ²2013 China.

SIGNIFICANT AWARENESS GAINS IN JUST TWO YEARS

GERMANY, UK AND USA

Awareness of 'Biodiversity'



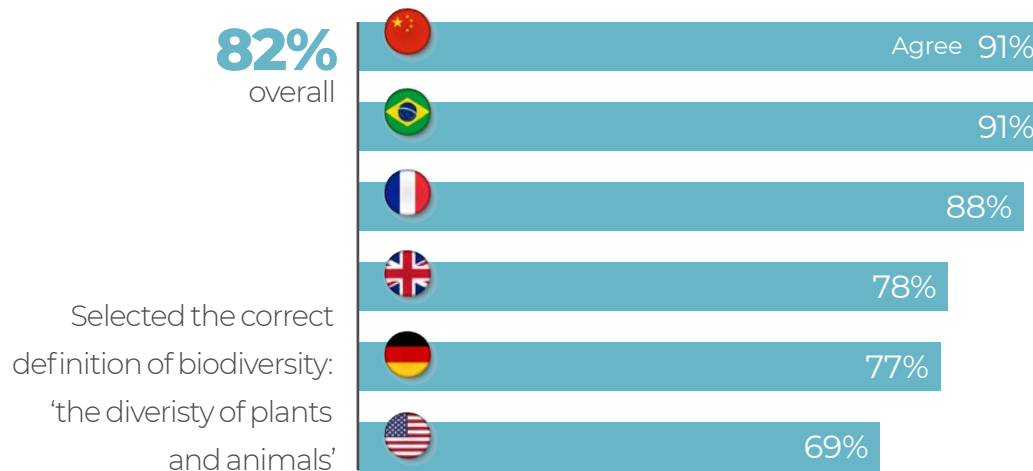
In those countries with the lowest scores (Germany, USA and UK) the data shows how awareness has risen significantly in recent years to reach a very high level of awareness today, with the strongest increase in Germany, moving from 29% awareness in 2009 to 76% in 2022.

“The **awareness of biodiversity** has been rising steadily, but in the last two years it has completely accelerated

Rik Kutsch Lojenga - UEBT Executive Director



CONSUMERS UNDERSTAND WHAT BIODIVERSITY IS: 'BIODIVERSITY IS THE DIVERSITY OF PLANTS AND ANIMALS'



“ **Consumer knowledge is getting more sophisticated.** They easily know biodiversity, and even newer concepts such as ‘regenerative’ are fairly well understood

Simona D’Amico – UEBT Head of Biodiversity and Impact

The research shows a high level of understanding of what biodiversity is. 87% of consumers surveyed had heard of the term ‘biodiversity’ and 82% could select the correct definition of biodiversity: ‘the diversity of plants and animals.’ Scores are particularly high for Brazil and China.

However, biodiversity is also highly associated with the measurement of the health of nature and life forms living in specific areas (74% and 73%). Although this is not the correct definition, it means that consumers relate biodiversity with health-related topics in this post-Covid era.

Q2. Here are a number of possible descriptions of biodiversity. For each of them, could you please indicate whether you completely agree with it, somewhat agree, somewhat disagree or completely disagree? Score on Total Agree. Basis – all sample – Brazil, China, France, Germany, UK, USA

Q12. Respondents were asked to select a from a pre-given list of possible definitions of ‘regenerative practices.’ 84% overall agreed to an accurate definition. Basis - all sample - Brazil, China, France, Germany, UK, USA





BRANDS THAT STAND OUT AMIDST THE PRESSURE

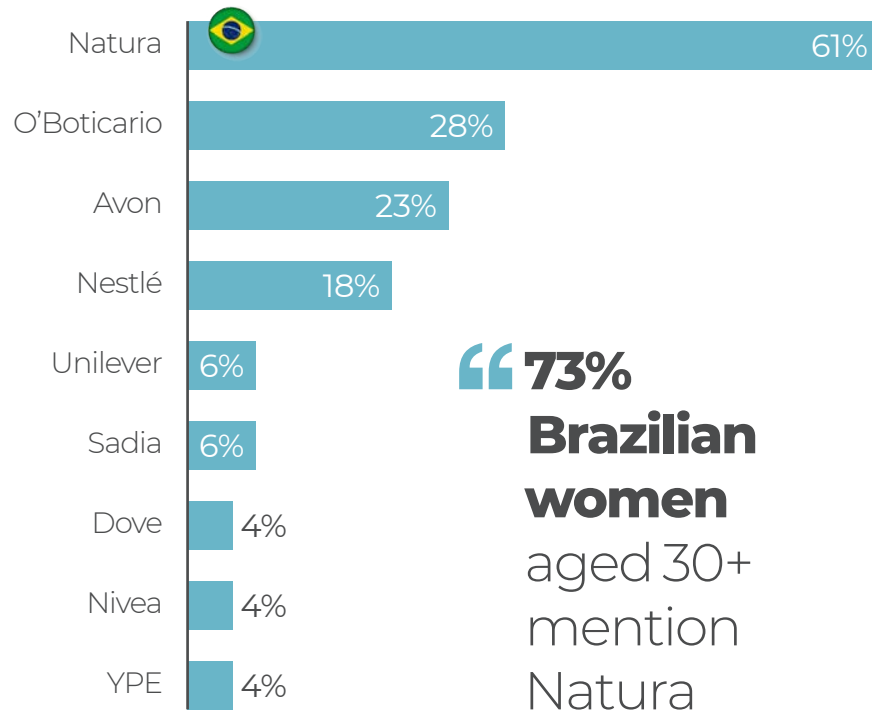
For a couple of years, the barometer has been tracing the evolution of the 'champions of biodiversity' – the brands consumers believe are taking action on biodiversity.

Even if the awareness of biodiversity has grown, only a few brands clearly stood out spontaneously in all countries, except for Brazil. 72% of consumers could name just one beauty or food brand, with younger consumers, consumers aware of biodiversity and women being ahead of other cohorts.

In Brazil, Natura maintains the most recognition amongst 69% of all respondents (compared to 55% in 2020).

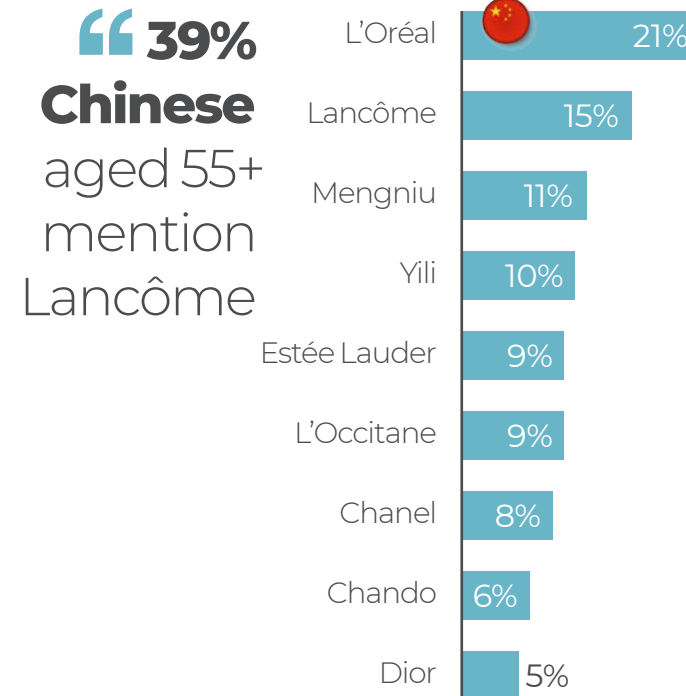


BRAZIL NATURA



“ **73%** Brazilian women aged 30+ mention Natura

CHINA L'ORÉAL



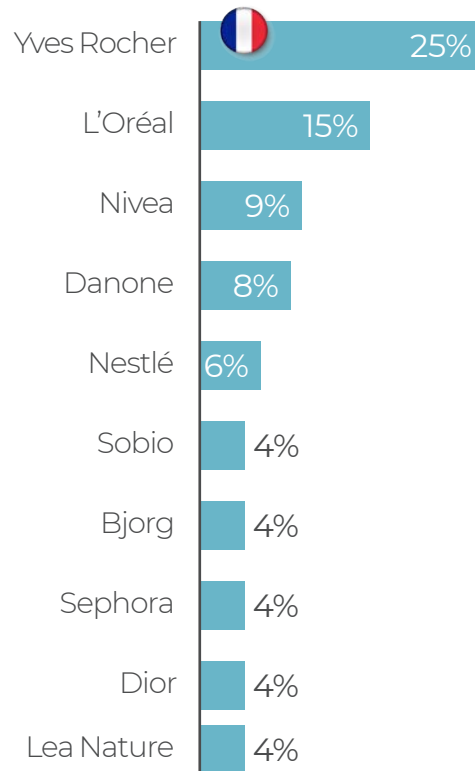
“ **39%** Chinese aged 55+ mention Lancôme



Q9. What are the 3 beauty and food brands you consider to take most concrete action to respect people and biodiversity? Base – At least one quotation – labels / Supermarkets removed from the top 10

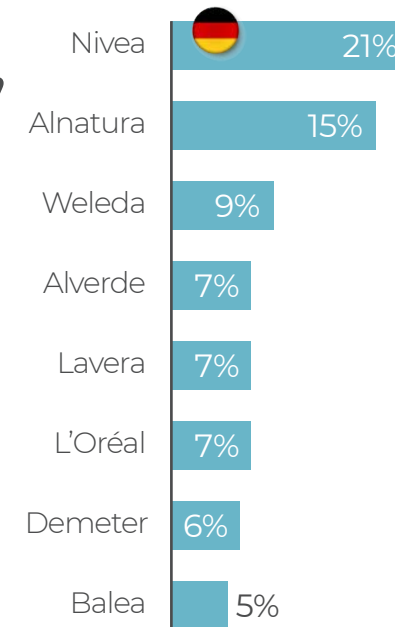
FRANCE YVES ROCHER

“ **39%**
French women
 aged 45+
 mention
 Yves Rocher



GERMANY NIVEA

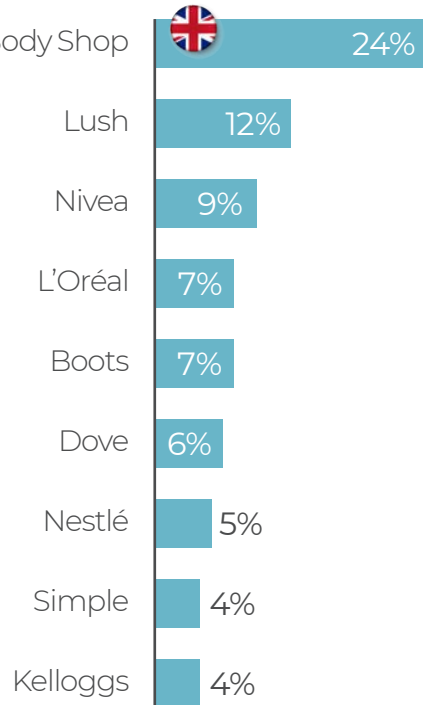
“ **19%**
'natural' brand
 purchasers
 cited Weleda
 (top with
 Nivea)



Q9. What are the 3 beauty and food brands you consider to take most concrete action to respect people and biodiversity? Base – At least one quotation – labels / Supermarkets removed from the top 10

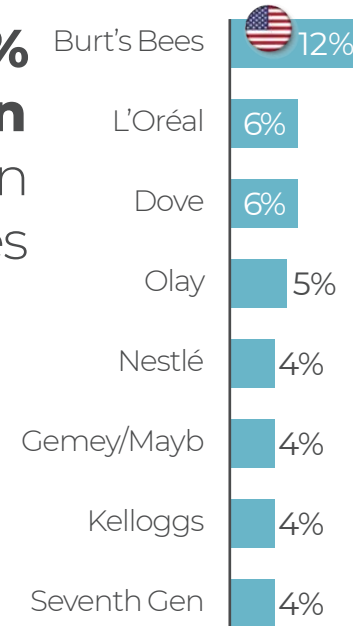
UK THE BODY SHOP

“ **33%**
British
women
 mention
 The Body
 Shop



USA BURT'S BEES

“ **18%**
US women
 mention
 Burt's Bees



Q9. What are the 3 beauty and food brands you consider to take most concrete action to respect people and biodiversity? Base – At least one quotation – labels / Supermarkets removed from the top 10

SURVEY METHODOLOGY

UEBT Consumer Survey

UEBT commissions independent market research companies to conduct consumer research for the UEBT Biodiversity Barometer. Interviews are conducted with nationally representative samples of 1,000 persons per country.

To correct sampling disparities, a post-stratification weighting of results, based on socio-demographic variables, is applied.

For cost reasons, UEBT opts for internet surveys where possible. In some countries face-to-face interviews and phone interviews were used in certain years. Different methods may slightly influence research outcomes.

The research in 2022 was conducted by Harris Interactive. Between 2009 and 2020 the research was conducted by IPSOS on behalf of UEBT.

For more information, please see www.biodiversitybarometer.org

UEBT is independent, impartial and objective in its dealings with governments, political parties, other organisations and individuals.

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UEBT is a non-profit association that promotes sourcing with respect. Its mission is to regenerate nature and secure a better future for people through ethical sourcing of ingredients from biodiversity.

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